

CUSTOMIZING YOUR SCHOOL'S CAL GRANT ROSTER



*PRESENTED BY:
CALIFORNIA STUDENT AID
COMMISSION*



IN TODAY'S WEBINAR...

- Phones will be muted to eliminate background noise
- All questions can be typed in the Q&A panel to the right, staff is available to answer your questions
- As you exit today's webinar, you'll be prompted to complete a brief survey, your response is greatly appreciated

CUSTOMIZING YOUR ROSTER

The screenshot shows the login page for the California Student Aid Commission WebGrants System. At the top, there is a navigation bar with links to CSAC, Cal Grants, Cash for College, Cal Dream Act, and FAFSA. Below this is the CA.GOV logo and the California Student Aid Commission logo. A large orange banner with the word 'WEBGRANTS' is prominently displayed. The main content area includes a welcome message, a sign-in section with fields for User Name and Password, and a 'Need to create an account?' section with links for School Administrator, User Account, Browser Versions, and Apple/Mac Computers. A legal disclaimer is present at the bottom of the main content area, and a footer with various links is at the very bottom.

CA.GOV California Student Aid Commission

WEBGRANTS

California Student Aid Commission
WebGrants System

Welcome! [Help With Your Account](#)

Please sign in

Please enter your user name, password.

Authorized Use Only

User Name

Password

[Sign-in](#)

Need to create an account?

- For a School Administrator Account:**
Please call 1-888-294-0148
or E-mail CSAC Support
- For a User Account:**
Contact your School Administrator
- For Browser Versions or Monitor Screen Area Settings:**
[Help With Your Account](#)
- Apple/Mac Computers:**
Results may be unpredictable

Pursuant to section 502 of the California Penal Code and Public Law 99-474, Title 18, United States Code, unauthorized access to applicant information will be prosecuted to the full extent of the law.

[Help](#) | [Contact Us](#) | [Glossary](#) | [Cal Grant Eligible Schools](#) | [Important Links](#) | [ECMC](#) | [Careers](#)

CUSTOMIZING YOUR ROSTER

California Student Aid Commission (SAPRD) WebGrants System

[Tools](#) [Help](#) [Sign Out](#)



Welcome! SA9KOJ
To the **CSAC Portal** Menu

The last time you logged on to this system was: 06/03/2014 08:48:30
am

Number of failed attempts since your last login: 0

Please contact your School's System Administrator if you need access to additional screens.

Portal Menu

[WebGrants](#)

[Table Edit](#)

[User Administration](#)

[APLE](#)

[CA Dream Act](#)

[SB 70](#)

[Middle Class Scholarship](#)

Account Information


[View Your Account Details](#)

[Help With Your Account](#)

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Revision: 9 Date: 12/14/2009 11:43:03 AM



CUSTOMIZING YOUR ROSTER



**CALIFORNIA
STUDENT AID
COMMISSION**

**CAL GRANT PROGRAMS INSTITUTIONAL
PARTICIPATION AGREEMENT for
2012-16**

Name of Institution: _____

Address of Institution: _____

Office of Postsecondary Education
Identification (OPE ID) Number: _____

If using US Postal Service, please return to:
California Student Aid Commission
Program Administration & Services Division
ATTN: IPA Renewal
P.O. Box 419028
Rancho Cordova, CA 95741-9028

If using another delivery service, return to:
California Student Aid Commission
Program Administration & Services Division
ATTN: IPA Renewal
11040 White Rock Road
Rancho Cordova, CA 95670

Execution of this Agreement is mandatory for participation in the
California Student Aid Commission's Cal Grant Programs.

CUSTOMIZING YOUR ROSTER

California Student Aid Commission (SAPRD) WebGrants System

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)



Welcome! SA9KOJ
To the [WebGrants](#) Menu

The last time you logged on to this system was: 06/03/2014 08:48:30
am
Number of failed attempts since your last login: 0

Please contact your School's System Administrator if you need access to additional screens.

WebGrants Menu

- [Enrollment](#)
- [GPA](#)
- [Student Info](#)
- [School Info](#)
- [Roster/Reconciliation](#)
- [Data Transfer](#)
- [Chafee Grant](#)
- [NON-SSN GPA](#)

Account Information

- [View Your Account Details](#)
- [Help With Your Account](#)

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[NON-SSN GPA](#)

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[Display Accept / Reject Report](#)

Roster Menu

[Customize Roster](#)

[Display Roster](#)

[Print Roster](#)

Reconciliation

[Customize Reconciliation](#)

[Display Reconciliation](#)

[Display Accept / Reject Report](#)

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Customize Roster

- The following is a list of your roster formats.
- The CSAC Standard Roster format can not be changed or deleted.
- Existing roster formats can be copied, edited and renamed.
- Any roster format can be chosen as the "Preferred Format." The Preferred Format will display automatically when "Display Roster" is selected from the Roster Main menu.



Row #	Name	Preferred Format	Edit	Delete
1	CSAC Standard Roster	<input checked="" type="radio"/>		

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CUSTOMIZING YOUR ROSTER

Roster Format Title		
Roster Format	<input type="text" value="New Unpaid Comp CGB"/>	Preferred <input type="radio"/> Yes <input checked="" type="radio"/> No

CUSTOMIZING YOUR ROSTER

Select Data Elements and Column Order

- ◆ "Data Elements Available" contains a list of all available roster elements.
- ◆ Click and highlight each data element that you wish to display on your roster.
- ◆ For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- ◆ Once items are highlighted, click on "Add Data Element(s)".
- ◆ The "Data Elements Selected" box will reflect the column headings that will display on your roster format.
- ◆ "Remove Data Element(s)" will delete the selected elements from your selection list.
- ◆ Use the "Move Up" and "Move Down" to order the individual column headings for display.
- ◆ After selecting data elements, click "Continue" to choose sort options.

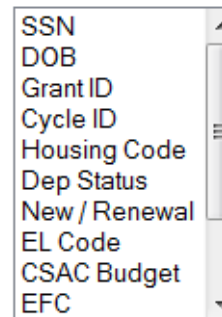
Data Elements Available

A vertical list box with a scroll bar, currently empty, representing the 'Data Elements Available' section.

Add Data Element(s)

Remove Data Element(s)

Data Elements Selected

A vertical list box with a scroll bar containing the following elements: SSN, DOB, Grant ID, Cycle ID, Housing Code, Dep Status, New / Renewal, EL Code, CSAC Budget, and EFC.

Move Up

Move Down

CUSTOMIZING YOUR ROSTER

Select Terms

- ✦ Select the term(s) you wish to display
- ✦ Selecting only one(1) term will allow users to sort records by term-specific data elements
- ✦ After selecting term(s), click "Continue" to choose sort options

☐ **Fall**

☐ **Winter**

☐ **Spring**

☐ **Summer**

Continue

Define Sort Order Preferences

- ✦ Click drop down boxes to choose elements for sort.

First Sort Preference

Roster Section ▼

Ascending ▼

Second Sort Preference

Last Name ▼

Ascending ▼

Third Sort Preference

First Name ▼

Ascending ▼

Fourth Sort Preference

Middle Initial ▼

Ascending ▼

Fifth Sort Preference

SSN ▼

Ascending ▼

Sixth Sort Preference

▼

Ascending ▼

CUSTOMIZING YOUR ROSTER

Define Selection Criteria

- ▶ Check boxes below to limit the records you wish to display.
- ▶ A checked box means that only records with those values will be included. (*If no box or every box is checked in a category, you will see all those records for your school.*)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input type="checkbox"/> C1	<input type="checkbox"/> C2
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
Housing Code	<input type="checkbox"/> On Campus (1)	<input type="checkbox"/> Off Campus (2)	<input type="checkbox"/> With Parents (3)	
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 <input type="checkbox"/> 5+
EL Status	<input type="checkbox"/> Verification Not Required (1)		<input type="checkbox"/> Not Paid, Verif Required (2)	
	<input type="checkbox"/> Verified As Reported (3)		<input type="checkbox"/> Verified with Change (4)	
	<input type="checkbox"/> Unable to Verify (5)		<input type="checkbox"/> Paid, Verification Required (6)	
New/Renewal Students	<input type="checkbox"/> New	<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
Section	<input checked="" type="checkbox"/> Eligible	<input checked="" type="checkbox"/> CC Reserve	<input checked="" type="checkbox"/> Ineligible	<input type="checkbox"/> Not In Attendance
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year	<input type="checkbox"/> Not TCP nor 5th Year	

CUSTOMIZING YOUR ROSTER

E1 On Hold Status

- ☐ Verification Required
- ☐ Verification Not Required

☐ Verification Completed

E2 On Hold Status

- ☐ Waiting for G6 Return
- ☐ School Verified Eligible

☐ Requires Verification by School

☐ School Verified Ineligible

Dream App Flag

☐ Dream App Student

☐ Non Dream App Student

Asset Hold Flag

- ☐ On Hold
- ☐ Not On Hold

☐ Release from Hold

Payment Status

☐ Paid

☐ Unpaid

Top 2% Cal B Entitlement Awards

☐ Yes

☐ No

[Adj Reason Codes](#)

☐ AF

☐ AH

☐ AT

☐ FT

☐ GR

☐ HT

☐ IA

☐ IB

☐ IC

☐ IP

☐ LA

☐ LD

☐ NP

☐ NS

☐ OF

☐ OH

☐ OT

☐ RF

☐ RH

☐ RT

☐ SH

☐ SL

☐ SR

☐ TT

Annual Need

From \$ To \$

Annual Award Amount

From \$ To \$

Remaining Eligibility

From % To %

Forecast Eligibility

From % To %

CUSTOMIZING YOUR ROSTER

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Online Roster

♦ Be sure to save all entries before exiting the Roster or changes will be lost.


School ID =

Acad Year = 2014 - 2015 ▾

Format = CSAC Standard Roster ▾

Search = SSN ▾ [GO!](#)

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CSAC Standard Roster

0-1 rem elig

Accepted NON Reconciled FL

Accepted NON Reconciled SP

Accepted NON Reconciled SU

Accepted NON Reconciled WN

CGA Fall Unpaid Records

Cal Grant C

Comp Unpaid Fall

Comp Unpaid Spring

Comp Unpaid Winter

Competitive Awards Only

E1 CGB

EL Verification Required

NO SSN

New (Eligible Only)

New ABCCompetitive Awards Only

New Unpaid Comp CGB

Not In Attendance

Renewal Less Than 100 Elig

THANK YOU!

***California Student Aid Commission
Institutional Support***

(888) 294-0153

schoolsupport@csac.ca.gov